

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
OF SAN BERNARDINO COUNTY, CALIFORNIA
AND RECORD OF ACTION**

33

June 3, 2003

FROM: **LARRY WALKER**
Auditor/Controller-Recorder
AURELIO W. DE LA TORRE, Director
Purchasing Department

SUBJECT: **SELECTION OF VENDORS FOR MICROGRAPHICS AND INDEXING SERVICES**

RECOMMENDATION:

1. Approve selection of PFA, Inc., Continental DataGraphics and Anacomp as a pool of vendors for countywide micrographics, imaging and indexing services for three years.
2. Approve the selection of Continental Datagraphics, Convert-a-Doc and SoftFile as a pool of vendors for countywide microfiche and microfilm conversion and indexing services for three years.
3. Approve a three-year contract with PFA, Inc. for micrographics, imaging and indexing services for the Recorder's Office.

BACKGROUND INFORMATION: On March 18, 2003, the Board of Supervisors authorized the Auditor/Controller-Recorder's (ACR) Office to issue an RFP for vendors to provide micrographics, imaging and indexing services.

On March 18, the RFP was posted on the Purchasing Department website, and the ACR notified 21 firms via email and telephone. On April 2, 2003, a non-mandatory proposal conference was held and was attended by ten vendors. Eight firms submitted proposals by the April 7 deadline.

The proposals were evaluated by representatives from Information Services, Purchasing, Treasurer-Tax Collector, Auditor/Controller-Recorder, and Employee Health and Wellness. The evaluation team rated the firms based upon providing two different types of services. Not all proposals responded to both service types.

The first service, currently utilized by the Recorder's office, involves the vendor's receipt of digitized images, conversion of the images to microfilm in order to provide a medium that qualifies as archival, and the associated indexing of data including Grantor/Grantee, When Recorded Mail To, Assessor's Parcel Number, and the short legal description. The indexed data is then used to provide the search capability to retrieve the associated document images within the Recorder's system. The indexing service is complicated by the fact that the information can be located in different places depending upon the document type and the document preparer. It differs from the type of indexing outlined in the second service, where the information to be indexed is in a standardized, and therefore simpler, format.

Page 1 of 3

Record of Action of the Board of Supervisors

33

**BOARD OF SUPERVISORS
MICROGRAPHICS, IMAGING AND INDEXING SERVICES AND MICROFILM AND
MICROFICHE CONVERSION**

33

June 3, 2003
Page 2 of 3

The second service, which may be used by any department needing such service, includes conversion of microfiche or microfilm to a digital format, which could then be loaded into any electronic storage system, including ISD's County Enterprise FileNet Document Management System, and then indexed as needed to meet business needs.

For the Recorder-type services, six vendors submitted proposals. The proposals were evaluated as to project understanding, the vendor's qualifications, experience, and ability to provide the service, and the proposed cost. The evaluation team selected three qualified vendors: 1) PFA, Inc., 2) Continental DataGraphics, and 3) Anacomp.

For the services that include microfiche conversion to digital and indexing, seven vendors submitted proposals. The proposals were evaluated as to project understanding, the vendor's qualifications, experience, and ability to provide the service, and the proposed cost. The evaluation team selected three qualified vendors: 1) Continental DataGraphics, 2) Convert-A-Doc, and 3) SoftFile. County departments desiring to utilize one of these vendors will work through ISD for digital conversion formatting recommendations and through Purchasing for contract negotiations and to process approvals individually.

For the Recorder's Office, the ACR negotiated a contract with PFA, Inc. and presents that agreement to the Board for approval today. The financial comparison of the three qualified vendors is as follows:

	6/3/03-6/30/04	7/1/04-6/30/05	7/1/05-6/30/06
PFA	\$ 378,425	\$ 367,650	\$ 387,225
Continental Datagraphics	\$ 392,320	\$ 380,970	\$ 401,625
Anacomp	\$ 581,000	\$ 604,850	\$ 612,500

REVIEW BY OTHERS: This agenda item has been reviewed by County Counsel (Kevin Norris, Deputy County Counsel and Michelle Blakemore, Deputy County Counsel) on May 14, 2003, and May 22, 2003 respectively; Purchasing Department (Betty Alexander, Contracts Analyst) on May 14, 2003; Treasurer-Tax Collector (Dennis Draeger, Assistant Tax Collector) on May 14, 2003; the Center for Employee Health and Wellness (Deanna Stover, Chief of Clinical Operations) on May 14, 2003; the County Administrative Office (Tracy Lindsay, Administrative Analyst) on May 19, 2003; and Information Services Department (Leyden Hahn, CIO) on May 19, 2003.

FINANCIAL IMPACT: As total compensation for the services to be provided by PFA, Inc. to the Recorder's Office, the County will pay PFA \$.02 per image to convert digitized images to microfilm, \$25 per conversion event, and \$.27 per document for indexing. The ACR has estimated the volume of documents recorded and images per document, and based on the estimates, expects the costs for the three years of the contract to be as follows:

6/3/03 – 6/30/04	\$378,425
7/1/04 – 6/30/05	\$367,650
7/1/05 – 6/30/06	\$387,225

However, the amount paid will be based on the number of documents recorded and images produced.

33

**BOARD OF SUPERVISORS
MICROGRAPHICS, IMAGING AND INDEXING SERVICES AND MICROFILM AND
MICROFICHE CONVERSION**

33

June 3, 2003
Page 3 of 3

COST REDUCTION REVIEW: The County Administrative Office has reviewed this item and concurs with the recommendation. The cost of this contract is fully funded through a non-general fund revenue source that is not in jeopardy (SDW REC).

SUPERVISORIAL DISTRICT(S): All.

PRESENTER: Larry Walker, Auditor/Controller-Recorder, 386-8813
Aurelio De La Torre, Director, 387-2074

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